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# Retail Bags: United States

December 2019



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# Table of Contents

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<b>1. Highlights</b>	<b>3</b>
<b>2. Market Environment</b>	<b>5</b>
Historical Trends	5
Key Economic Indicators	7
Environmental & Regulatory Factors	8
<b>3. Segmentation &amp; Forecasts</b>	<b>10</b>
Products	10
Single-Use Plastic	12
Single-Use Paper	13
Reusable	14
Markets	15
Grocery Stores	16
Foodservice	17
Other Retail Markets	18
<b>4. Industry Structure</b>	<b>20</b>
Industry Characteristics	20
Market Share	21
Novolex	21
Advance Polybag	22
Inteplast	22
<b>5. About This Report</b>	<b>23</b>
Scope	23
Sources	24
Industry Codes	25
Freedonia Methodology	25
Resources	27

# List of Tables & Figures

---

Figure 1   Key Trends in the US Retail Bag Market, 2018 – 2023	4
Figure 2   US Retail Bag Demand Trends, 2008 – 2018	5
Table 1   Key Indicators for US Retail Bag Demand, 2008 – 2023	7
Figure 3   US Retail Bag Demand by Product, 2008 – 2023 (bil units)	10
Table 2   US Retail Bag Demand by Product, 2008 – 2023 (mil units)	10
Figure 4   US Retail Bag Demand by Product, 2008 – 2023 (%)	12
Figure 5   US Retail Bag Demand by Market, 2008 – 2023 (bil units)	15
Table 3   US Retail Bag Demand by Market, 2008 – 2023 (mil units)	15
Figure 6   US Retail Bag Demand by Market, 2008 – 2023 (%)	19
Figure 7   US Retail Bag Market Share by Company, 2018 (%)	21
Table 4   NAICS & SIC Codes Related to Retail Bags	25

# About This Report

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## Scope

This report forecasts to 2023 US retail bag demand in units. Total demand is segmented by product in terms of:

- single-use plastic
- single-use paper
- reusable

Total demand is also segmented by market as follows:

- grocery stores
- foodservice
- other retail markets such as big-box stores, general merchandise stores, discount stores, hardware stores, department stores, and specialty stores

To illustrate historical trends, total demand is provided in annual series from 2008 to 2018; the various segments are reported at five-year intervals for 2008, 2013, and 2018.

This report analyzes the market for retail bags in the US. Retail bags are bags used at the point of sale for consumers to carry their purchases from the store. These bags can be provided free by the retailer, purchased at the retailer at the time of purchase, or brought to the store by the customer.

Retail bags are also known as and include the following: carrier bags, carryout bags, die-cut handle bags, fast food bags, grocer bags, merchandise bags, paper sacks, promotional shopping bags, reusable shopping bags, soft loop handle bags, thank you bags, t-shirt bags, wave-top bags, and to go bags.

Retail bags may be made of bleached or unbleached paper; natural fibers like cotton, jute, linen, or hemp; or a variety of plastics, including: high-density polyethylene (HDPE), linear low-density polyethylene (LLDPE), low-density polyethylene (LDPE), recycled polyethylene terephthalate (rPET), synthetic fibers such as nylon or polyester, and woven and non-woven polypropylene (PP).

Bags included in this report are only those sold specifically as shopping bags. Excluded from the scope of this report are: bag stock, bakery bags, book bags, can liners, deli bags, dry-cleaning garment bags, duffel bags, food storage bags, general purpose totes, gift bags, insulated cooler bags, kitchen bags, messenger bags, newspaper bags, packaging, party bags, pharmacy bags, produce bags, trash bags, and travel bags.

## About This Report

Also excluded are any other bags used for packing, storing, disposing, or protecting merchandise or that perform any other function other than handling merchandise.

Retailers that use these bags include: big-box stores, convenience stores, department stores, discount stores, drug stores, gas stations, grocery stores, liquor stores, outlet stores, pharmacies, quick service establishments (QSR), restaurants, specialty shops and stores, and supermarkets.

For purposes of this report, markets are defined as where the bag is received or purchased. For example, the grocery market includes only bags given or sold to customers at a grocery store. Reusable shopping bags purchased at other retail stores are counted in “other”, even if they are later used at a grocery store.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Retail Bags: United States* (FF30067) is based on [Retail Bags](#), a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental organizations
- proprietary national consumer survey data
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 4 | NAICS & SIC Codes Related to Retail Bags

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
314910	Textile bag and canvas mills	2393	Textile bags
322220	Paper bag and coated and treated paper manufacturing	2394	Canvas and related products
326111	Plastics bag and pouch manufacturing	2671	Paper: coated and laminated
326112	Plastics packaging film and sheet (including laminated) manufacturing	2672	Paper: coated and laminated, NEC
		2673	Bags: plastic, laminated, and coated
		2674	Bags: uncoated paper and multiwall
		3497	Metal foil and leaf

Source: US Census Bureau

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market’s current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

## About This Report

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

*Retail Bags*

### Freedonia Industry Studies

*Food Containers in the US*

*Food Safety Products in the US*

*Pouches in the US*

*Produce Packaging Market in the US*

### Freedonia Focus Reports

*E-Commerce: United States*

*Packaging Machinery: United States*

*Packaging: United States*

*Recovered Packaging: United States*

### Freedonia Custom Research

### Trade Publications

*Flexible Packaging*

*Packaging Digest*

*Packaging Impressions*

*Packaging Strategies*

*Packaging World*

*Plastics News*

*Plastics Quarterly*

*Plastics Technology*

*PlasticsToday*

### Agencies & Associations

American Forest and Paper Association

Flexible Packaging Association

National Restaurant Association

Plastics Division of the American Chemistry Council

United States Census Bureau

United States International Trade Commission